BPO_WEB PORTAL

VERSION RELEASE NOTES

BPO_WebPortal Version List:

[2.5.0.5] [2.3.0.6] [1.4.4.1] [1.4.3.0] [1.4.2.0]

2.5.0.5 - Official Release (08.07.2022 09.27 AM)

- **Release Priority:** Medium
- **Database Prerequisites:**
  - BPO v2.5.0.8 or later.
  - BPO WebPortal v2.3.0.6
  - IIS URL Rewrite Module 2 installer which is required for successful IIS setup of WebPortal.
- **Application Type:** BPO Supporting Application – Web Service

BPO WEBPORTAL V2.3.0.6 MODIFICATIONS

- **Version 2.5.0.5 Changes and Improvements**
  - Fixed support for getting Sales Studio Sales Proposal documents.

- **Version 2.5.0.4 Changes and Improvements**
  - Fixed date format issue when BPOWebPortal calls from external services cause invalid date format.
  - Fixed SaveMeterReading issue where end point errored if no equipment user defined field values existed.

- Added new BPOWebPortal stored procedures to use instead of stored procedures from other companion appplications:
  - o sp_bpoGet_WEB_CTRTMeterInfo for sp_bpoGet_MCON_CTRTMeterInfo.
  - o sp_bpo_WEB_SALSEmails for sp_bpo_CRM_SALSEmails.
  - o sp_bpo_WEB_SALSEmailAddressees for sp_bpo_CRM_SALSEmailAddressees.
  - o sp_bpo_WEB_SALSEmailAttachments for sp_bpo_CRM_SALSEmailAttachments.

- Version 2.5.0.3 Changes and Improvements
  - Added user right validation and entry for GetCustomerCallWorkOrders.
  - Updated test page sample JSON data.
  - Fixed issue where SaveServiceCall end point failed if CallNote was null.
  - Unnecessary BPOWebPortal user rights removed from base data.

- Version 2.5.0.2 Changes and Improvements
  - Corrected SaveO4BUserSetting URLs in BPOWebPortal.htm test page.
  - Fixed issue where user could login with empty username and password.
  - Removed Fee Status validation when saving Contract Item Fee as it gets set in code to A/I depending on Mode. Fee will not process if it fails validation.
  - Added GetCustomerCallsByLocation user right.

- Added missing user rights validation and removed unnecessary GetGridCaptions user right as these need to be retrieved irrespective of the user.
- Updated Open4Business end point information in this manual.

- **Version 2.5.0.1 Changes and Improvements**
  - BPOWebPortal now requires a saved BPO Service Manager Environment.
  - Added Company Name to information returned by Login end point.
  - Added User Right validation to GetSalesOrder and SaveServiceCallRequest.
  - Added missing User Rights for multiple end points.
  - Added new StartDate parameter for Customer Statement. Also added StartDate to Statement Details sproc, sp_bpoGet_WEB_SALSStatementDetails.
  - Customer Statement end point requires BPO 2.5 or later.
  - Fixed issue with SaveEmail end point with no attachments.
  - Added CustomerID validation to SaveCustomerAddress and SaveContact stored preocedures.
  - Updated BPO dlls.

- **Version 2.5.0.0 Changes and Improvements**
  - GetCustomerList url format changed to customers?search={SearchFilter}.
  - GetCustomerInvoices/sp_bpoGet_WEB_SALSInvoices now only returns Sales Invoices where specified customer is the billing customer instead of the invoice cus-

tomer. Contract invoices conditions remain as is.
- New O4B End Points.

- **Version 2.4.0.2 Changes and Improvements**
  - Fixed issue with GetNewContractDetail URI template causing CallID and CallTypeID to be swapped.
  - SaveContractItem() and SaveContractItemFee() input parameters now get validated through the ValidateContractItem() and ValidateContractItemFee() respectively.
  - ValidateContractItemFee() now validates that the ContractItemID exists on the specified ContractID.

- **Version 2.4.0.1 Changes and Improvements**
  - Added attachment parameter to SaveEmail to allow for email attachments to be saved.
  - Renamed stored procedures added in 2.4.0.0 to be in line with existing naming conventions.
  - Amended JSON parser GetDataTableAsJSON to exclude tab characters.

- **Version 2.4.0.0 Changes and Improvements**
  - Introduced user right validation to all endpoints.
  - Introduced additional endpoints (see Developer's Manual).

Additional Information

- All date formats must be submitted in 'yyyyMMdd' in the WebPortal parameters.
- For more information on the BPO WebPortal end points, please refer to the 'BPOWebPortal-2.5.0.5-DevelopersManual.pdf' document in the upgrade pack or via the home page 'PDF' button.

⊙ Rollout details

- Run the BPO_WebPortal_v2.5.0.5 upgrade and check for errors in the results file.
- Run the BPO_WebPortal_v2.5.0.5 Validation, and check that there are no errors.
- Install BPOWebPortal-2.5.0.5-Release.
- Install IIS_URL_ReWrite_Installer if not installed previously.

File Location on WinSCP

\Implementations\CO3_Releases\Applications\BPO_V2\BPO2_Com-panionInstallers\WebServices\BPO_WebPortal

2.3.0.6 - Official Release (21.01.2022 04.46 AM)

- **Release Priority:** Medium
- **Database Prerequisites:**
  - BPO v2.4.0.0 or later.
  - BPO WebPortal v1.4.4.1
  - IIS URL Rewrite Module 2 installer which is required for successful IIS setup of WebPortal.
- **Application Type:** BPO Supporting Application – Web Service

BPO WEBPORTAL V2.3.0.6 MODIFICATIONS

- CR 82 – Modified BPO WebPortal to conform to RESTful API best practices. Added support for BPO date formatting configuration using the 'fldISOCultureFormat' flag in BPO Configurator. Created the necessary end points to execute the business processes from creation of Sales Orders, New Deal Calls, Contracts and Manual Contract invoicing of pro rata fees. Included support for Sales Templates to implement the concept of Notional Items

with related items. Customer Functional Locations will be used as notional items on contracts to be able to create the contract before the contract item has been provisioned. After provisioning a contract item, it will be updated to be linked to the actual asset item instead of the functional location. New end points created to save, list, and get Customer and Contract documents.

- CR 85 - Added validation checks to SaveSalesOrder and SaveContract end points. WebPortal now checks the validity of customer parameters and codes. Added new end point ValidateCustomerForSalesOrder to validate customer data and check if the data is sufficient for a sales order. Added new end point ValidateCustomerForContract to validate customer data and check if the data is sufficient for a contract.

- CR 96 – BPO WebPortal end point created to deactivate the synced call relationship in InterConnect and close the call on the local BPO database. BPOWebPortal required a new end point to receive the cancelation request. When received, the field 'fldStatus' in tblICONSyncedCalls will be set to (I)nactive. The call will then be closed on that BPO system.

FIXES AND UPDATES

- DBN0088522 – Updated the GetCustomerList() end point to display all BPO customers except for customers in status 'I'.
- DBN0089152 – The below GetAddDatafields() end points should return the same data in WebPortal as when running the sprocs in the database for Customer, Asset, Call, Project, FunctionalLocation, Part, Supplier and WorkOrder. Sprocs have been amended to return the correct data.
- DBN0089971 - When logged into WebPortal and the user tried to login into BPO or any other companion app, the user was not able

to login even after logging out of WebPortal. Fix applied to allow users to login to BPO or any other companion app whilst still logged onto WebPortal.

- DBN0110126 - GetMeterDefCodes() end point - When running this end point in WebPortal, an error is displayed stating SELECT failed because the following SET options have incorrect settings QUOTED_IDENTIFIER.

- DBN0117172 – GetCustomerSalesOrders() end point - Missing or Invalid parameters error appeared when attempting to get the customer sales orders in WebPortal. Fixed by removing invalid parameter validation check.

- DBN0117189 – GetNewContractDetail() end point - When the user tries to process using this end point, a "Not Found" error is displayed.

- DBN0118857 - GetNewContractDetail() end point - When the user tried to use this function, a "CustomerID does not correspond with selected call" error occurred. When the user swapped the CallID with the NewType it worked. Fixed by amending function parameters to be consistent with the Interface.

- DBN0120278 - After installing WebPortal v2.3.0.6, we noticed that the page header, web browser tab name and the developer's manual all references v2.3.0.5 when the user opens the WebPortal web page. This issue has been resolved.

- DBN0098197 – Fixed several discrepancies when comparing the developer's manual to WebPortal.

Additional Information

- Legacy URL's have been deprecated and are no longer used in WebPortal.
- After installing WebPortal, users must first clear their web browser cache before attempting to open WebPortal.

- All date formats must be submitted in 'yyyyMMdd' in the WebPortal parameters.
- For more information on the BPO WebPortal end points, please refer to the 'BPOWebPortal-2.3.0.6-DevelopersManual.pdf' document in the upgrade pack or via the home page 'PDF' button.

Rollout details

- Run the BPO_WebPortal_v2.3.0.6 upgrade and check for errors in the results file.
- Run the BPO_WebPortal_v2.3.0.6 Validation, and check that there are no errors.
- Install BPOWebPortal-2.3.0.6-Release.
- Install IIS_URL_ReWrite_Installer if not installed previously.

File Location on WinSCP

\Implementations\CO3_Releases\Applications\BPO_V2\BPO2_CompanionInstallers\WebServices\BPO_WebPortal

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1.4.4.1 (18.03.2019 10.56 AM)

Application Version Compatibility

- BPO_RSI: v1.27.0.0 \ BPO_TEL: v1.4.0.0 or later \ BPO2

Requirements

- BPOConnect

SQL Changes

1. sp_bpoGet_WEB_CTRTCustomerContracts.sql
2. sp_bpoGet_WEB_CTRTItemFees.sql

3. sp_bpoGet_WEB_CTRTItemMeters.sql
4. sp_bpoGet_WEB_CTRTMeterCharges.sql
5. sp_bpoGet_WEB_SALSCallDeliveryNotes.sql
6. sp_bpoGet_WEB_SALSCustomerOrders.sql
7. sp_bpoGet_WEB_SALSDeliveryNoteItems.sql
8. sp_bpoGet_WEB_SALSInvoiceItems.sql
9. sp_bpoGet_WEB_SALSInvoices.sql

Code Changes

1. End Point Changes
   a. GetCustomerSalesOrders
   b. GetCustomerInvoices

API Changes

1. CallLog end point does not require CallRef parameter therefore this parameter has been removed in the Developers Manual as any parameter value that was supplied would have been overwritten.

Upgrade Notes

- Run BPO_WebPortal_v1.4.4.1 Upgrade script
- Run BPO_WebPortal_v1.4.4.1 WebService Installer

File Location on WinSCP

\Implementations\CO3_Releases\Applications\BPO_WebPortal\v1.4.4.1

1.4.3.0 (07.02.2019 8:31 AM)

SQL Changes

1. sp_bpo_WEB_SALSOrderDetails – Added SuppressOnPrint to sales order line items.

Code Changes

1. Added GetCustomerList end point.
2. Added GetCustomerEquipmentList2 end point.
3. Added GetCustomerWorkOrders end point.
4. Added GetCustomerProjects end point.
5. Added GetRanks end point.
6. Added GetCommercials end point.
7. Added GetTaxRates end point.
8. Added GetCustomerTypes end point.
9. Added GetCreditCheckOptions end point.
10. Added GetCreditTerms end point.
11. Added GetReportingAreas end point.
12. Added GetBankNames end point.
13. Added GetBankAccountTypes end point.
14. Added GetPaymentMethods end point.
15. Added GetCurrencies end point.
16. Added GetContactTypes end point.
17. Added GetAddDataFieldsCustomer end point.
18. Added GetAddDataFieldsAsset end point.
19. Added GetAddDataFieldsCall end point.
20. Added GetAddDataFieldsFunctionalLocation end point.
21. Added GetAddDataFieldsPart end point.
22. Added GetAddDataFieldsSupplier end point.
23. Added GetAddDataFieldsWorkOrder end point.
24. Added SaveAddDataFieldsCustomer end point.
25. Added SaveAddDataFieldsAsset end point.
26. Added SaveAddDataFieldsCall end point.
27. Added SaveAddDataFieldsFunctionalLocation end point.
28. Added SaveAddDataFieldsPart end point.
29. Added SaveAddDataFieldsSupplier end point.
30. Added SaveAddDataFieldsWorkOrder end point.
31. Added GetSalesmen end point.

32. Added GetEmployeeList end point.
33. Updated SaveContact end point to include ContactType.

Upgrade Notes

- Install: BPOWebPortal-1.4.3.0
- Upgrade: Run the BPO_WebPortal_v1.4.3.0_Upgrade script

File Location on WinSCP

\Implementations\CO3_Releases\Applications\BPO_WebPortal\v1.4.3.0

1.4.2.0 (29.09.2017 4:01 PM)

Change

- Added SuppressOnPrint to sales order line item.

Upgrade Notes

○ Run BPO_WebPortal_v1.4.2.0 Upgrade script
○ Run BPO_WebPortal_v1.4.2.0 WebService Installer

Application Compatibility

○ BPO_RSI v1.27.0.0 \ BPO_TEL v1.4.0.0 or later

File Location on WinSCP

\Implementations\CO3_Releases\Applications\BPO_WebPortal\v1.4.2.0

BPO.RSI.044